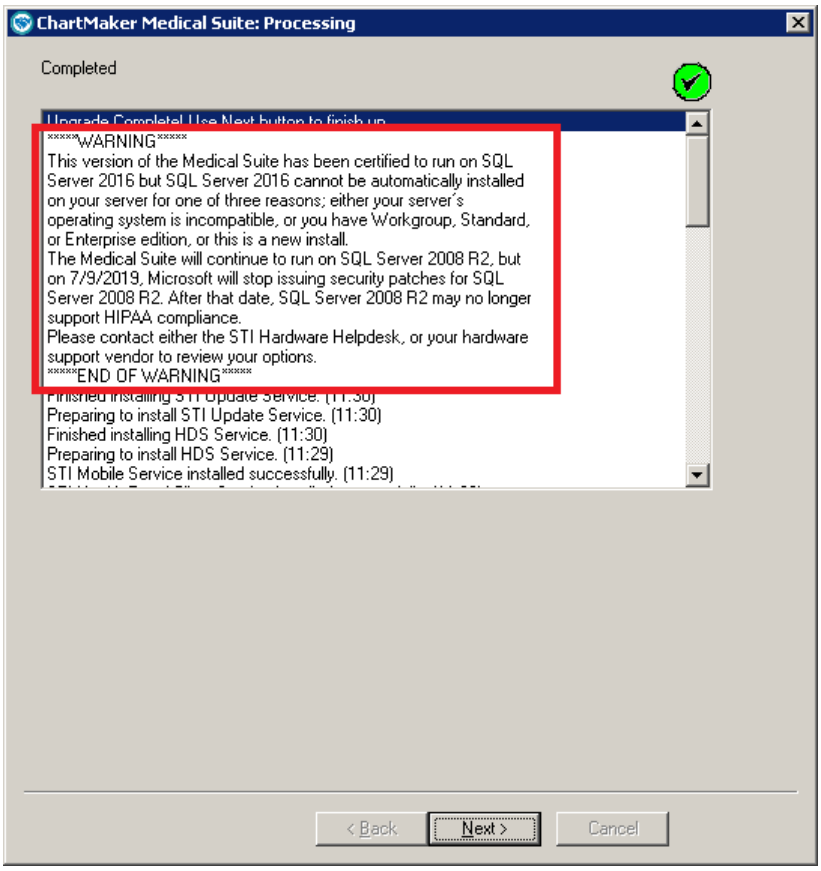
ChartMaker® Clinical Release Notes

ChartMaker® 2022.1 (fv6.7.7)

Important Notifications

- **Upgrade from Microsoft Server 2008/2012 and Windows 7/8 –** Since January 2020, your **Windows 7/8** workstations and **Microsoft 2008 Servers** are no longer supported. Likewise, support for **Windows 8.1** will end on January 10, 2023, and support for **Windows Server 2012/2012R2** will end on October 10, 2023. Even with security patches, **problems may still arise** if you choose not to upgrade. In addition, your workstations are not HIPAA compliant. To avoid these issues, contact our **Technical Services Department** today.

- **SQL Server 2016 & the ChartMaker 2018.2 (File Version 6.3.3) Upgrade –** Beginning with ChartMaker 2018.2 (File Version 6.3.3) Upgrade, a warning message will appear upon the completion of the upgrade regarding the transition of the ChartMaker Medical Suite to using SQL Server 2016, for those offices where an automated upgrade to SQL Server 2016 was not possible. See the figure below. If you are receiving this message, to avoid potential issues and to ensure your system remains HIPPA compliant, it is important to contact either STI Hardware Helpdesk, or your software vendor, to review your options.



ChartMaker Medical Suite SQL Server 2016 Warning

Added Features

- **Audit Trail –** The Audit Trail has been updated to track whenever a scanned document is sent to another user via the **Sent to** option in the Scan Management dialog. When an audit event occurs, the Event column will display **Scan**; the Group column will display **Note**; the Audit Trail Description will display **PHI Import [Header]**; the New Value will display **Send to [User ID]**; and the Metadata column will contain the **Account ID**, **Note ID**, and **Visit Date**.8]

- **Decision Support – Alert Manager –** The Alert Manager dialog has been updated so that whenever it is accessed, it will open with an increased width allowing you to easily address the alert without having to scroll to the Addressed checkbox. See Figure 1.

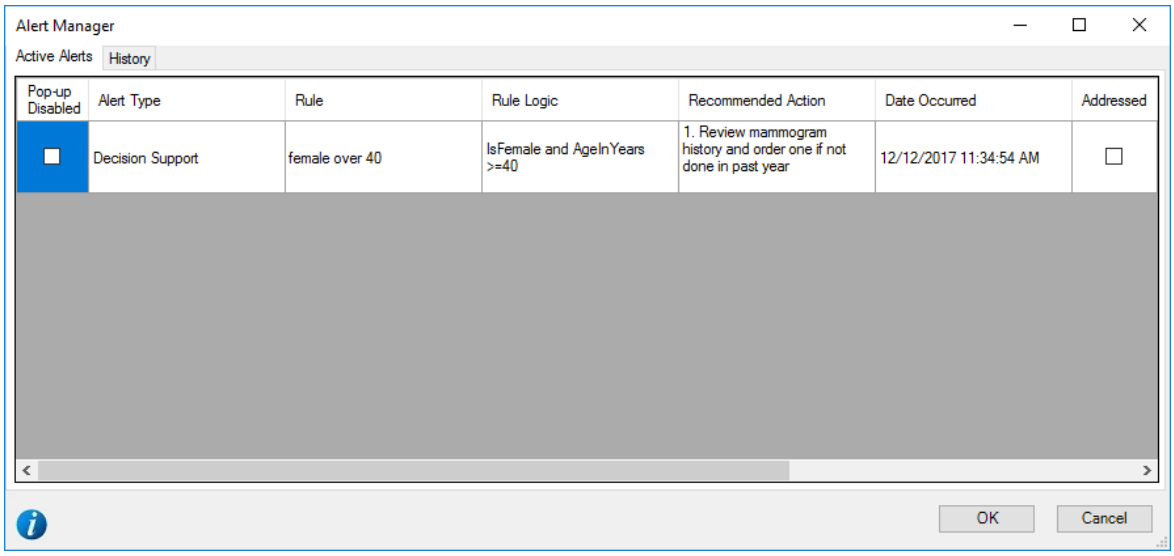


Figure 1 – Alert Manager

Added Features (continued)

- **Electronic Health Information Export –** To adhere to the Electronic Health Information (EHI) export requirements for the 21st Century Cures Act (21CCA), the system has been updated with a new **Electronic Health Information Export** dialog (accessed via **Chart** > **Export** > **Electronic Health Information Export**) that allows you to export all patient data for an **Individual Patient**, or for the entire **Patient Population**. See Figure 2. Access to this dialog is limited to those users that have a **Patient Data Export** privilege of **Export** or **All**. Likewise, given the amount of disk space and system resources that exporting all EHI data for the entire patient population entails, the Patient Population tab will initially disabled, and you will need to contact Software Support to enable this functionality. Once the Electronic Health Information Export dialog is accessed, you will see three tabs: **Individual Patient**, **Patient Population**, and **Export Status**.

  The **Individual Patient** tab allows you to export the entire EHI data in the system for an individual patient. Options are available to select the desired patient and choose an Output Directory. Additionally, once the output director is entered, the amount of disk space will populate. After the export options have been configured, you can click the **Export** button to initiate the export. You can view the status of the export in the Export Status dialog, and once the export is complete a To-Do List message will appear for the user that initiated the export.

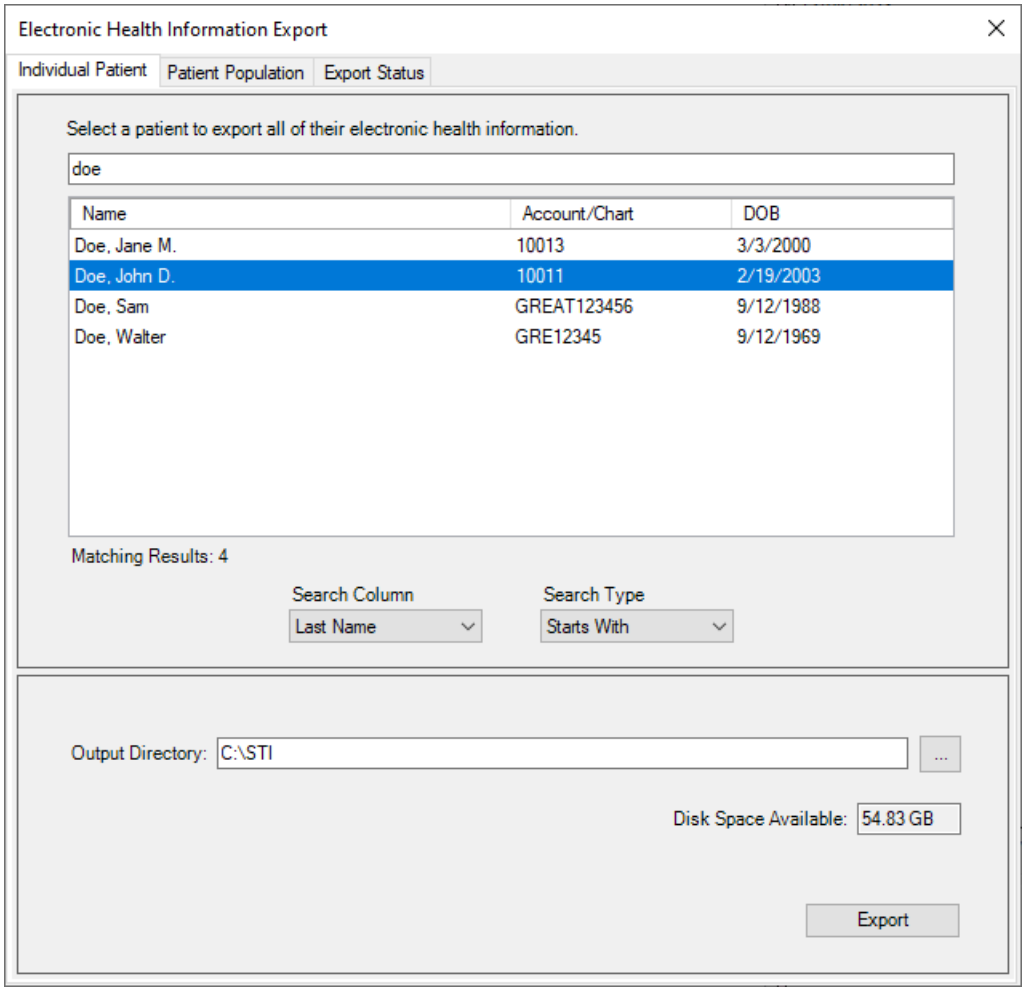


Figure 2 – Electronic Health Information Export – Individual Patient

Electronic Health Information Export (continued)

The **Patient Population** tab allows you to export the entire EHI data in the system for all patients for selected practices and/or providers. Options are available to select the desired practices and providers, configure an Export Name, choose an Output Directory, and whom to Notify once the export is complete. See Figure 3. Additionally, once the output director is entered, the amount of available disk space will populate, and you will need to check the confirmation option indicating that you are aware of the disk space requirements for the export. After the export options have been configured, you can click the **Export** button to initiate the export. You can view the status of the export in the Export Status dialog, and once the export is complete a To-Do List message will appear for the user selected in the Notify field.

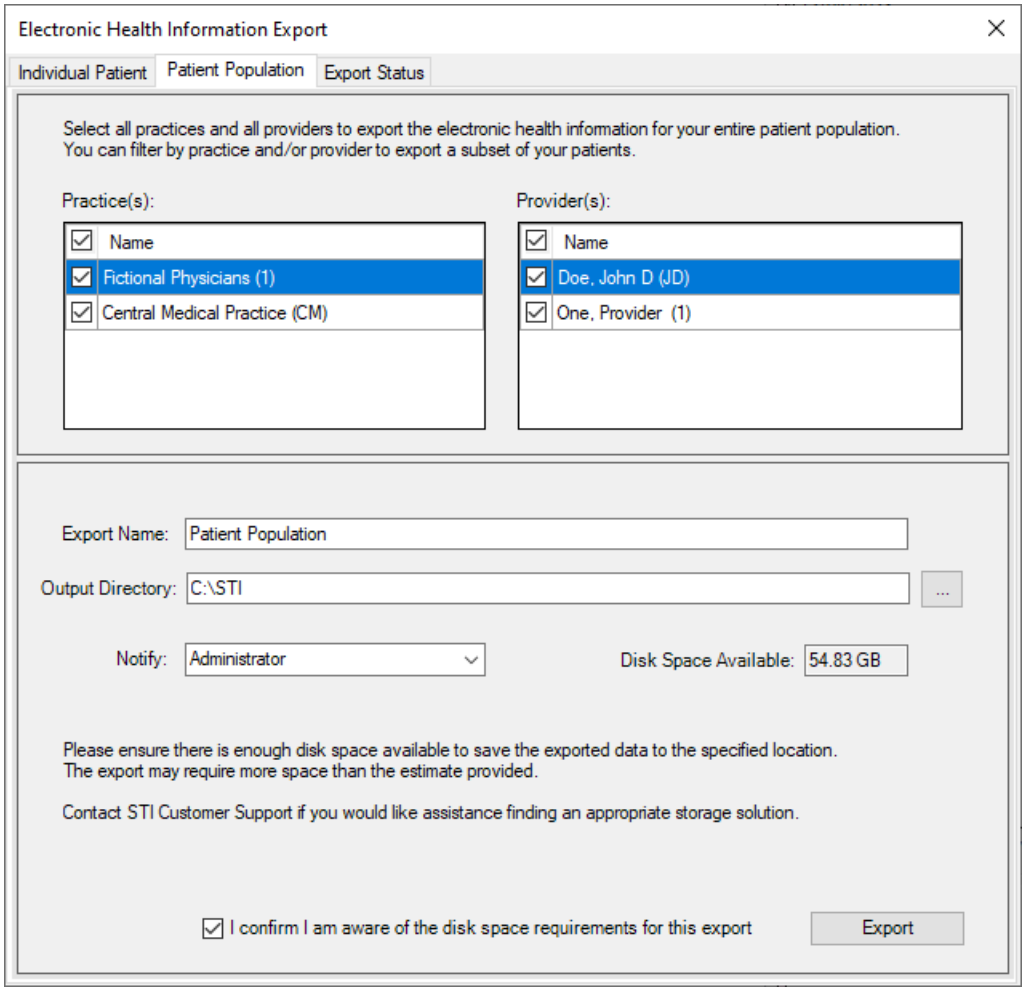


Figure 3 – Electronic Health Information Export – Patient Population

Electronic Health Information Export (continued)

The **Export Status** tab allows you to view export status information for each export that was started. It will display the export **Name**, **Start Date**, **Output Directory**, current **Status**, and if any records **Failed**. See Figure 4. You can click the corresponding blue Information button to view the Export Setting for the export. Also, you have ability to **Cancel** and **Resume** an export that is currently active using the buttons at the bottom of the dialog.

When an export has completed the exported files will be in the designated Output Directory. Also, a Readme.txt file will also be included in that directory that contains a hyperlink (https://sticomputer.com/electronic-health-information-export/) for the export format document which contains information on how the various export files are formatted.

The system will also track in the Audit Trail when an Individual Patient export has completed, when a Patient Population export has completed, as well as if an export was canceled and/or resumed. Additionally, a To-Do List message will be sent the applicable user if the export stops due to a lack of disk space.

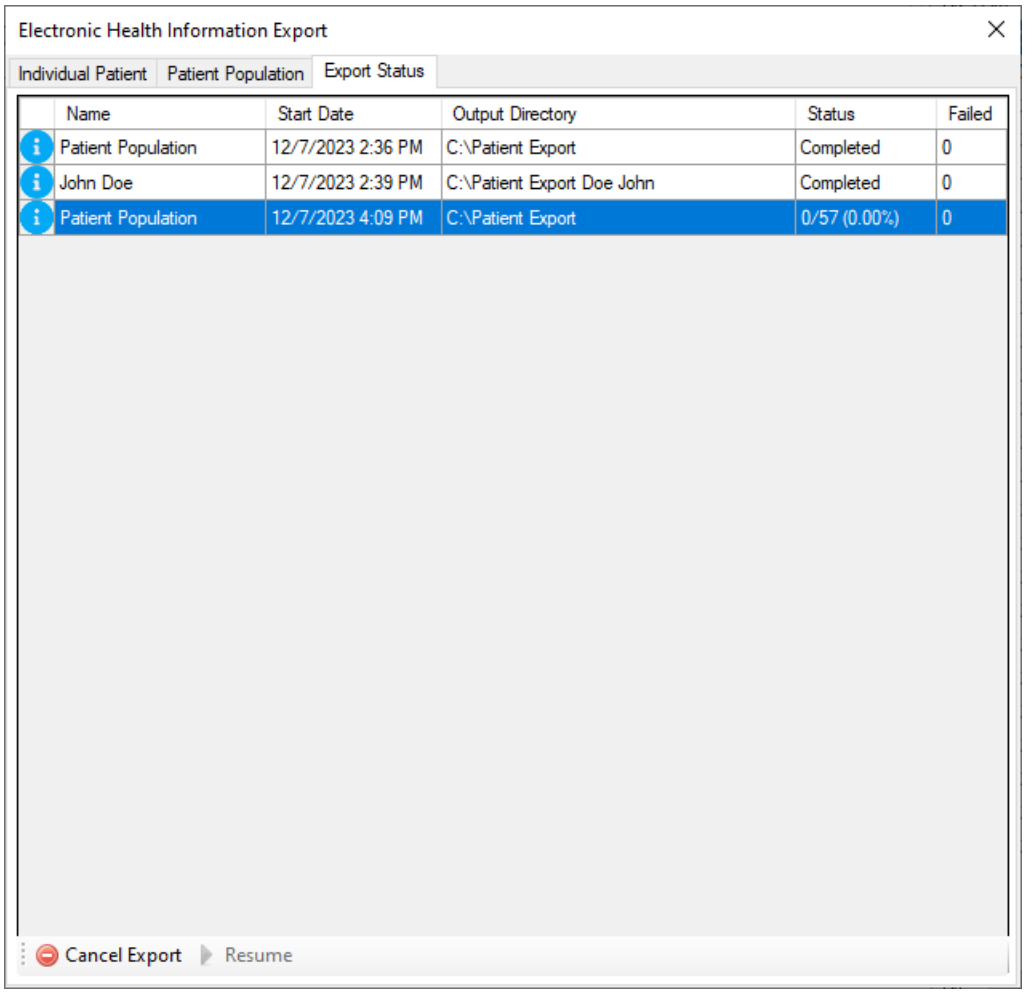


Figure 4 – Electronic Health Information Export – Export Status

Added Features (continued)

- **The ID Tab –** In order to alleviate some inadvertent changes to editable fields in the ID tab, the system has been updated so that when accessing the ID tab, the focus and cursor will start in read-only Chart # field. The user will then need to click or tab into the editable fields to make any necessary changes.

- **The ID Tab – Case –** The **Insurance** drop-down list, in the **Case** section of the **ID** tab, has been updated so that expired insurances will be appended with an **(EXPIRED)** indicator to easily distinguish active and expired insurances in a patient's chart. See Figure 5.

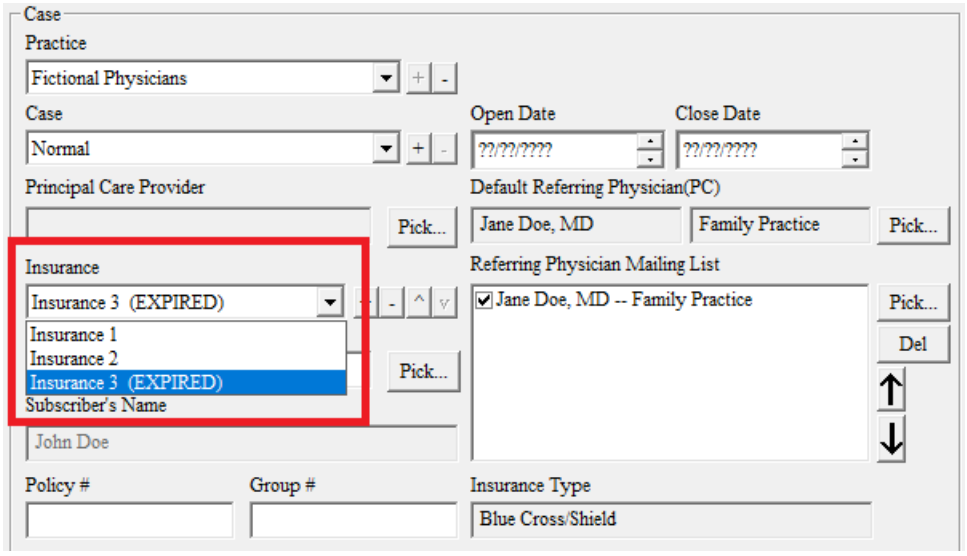


Figure 5 – ID Tab – Case

Likewise, when an insurance is selected, if you mouse over the insurance a tooltip will be displayed indicating the expiration date of the insurance, if configured. See Figure 6.

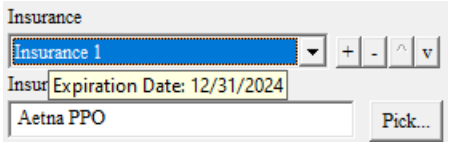


Figure 6 – ID Tab – Case – Insurance

Added Features (continued)

- **MIPS Dashboard – Configuration –** The **Qualifies for small practice bonus** option in the Quality Reporting section in the MIPS Dashboard Configuration dialog (for the 2023 performance period), has been relabeled to **Qualifies as small practice** to better describe this option. See Figure 7.

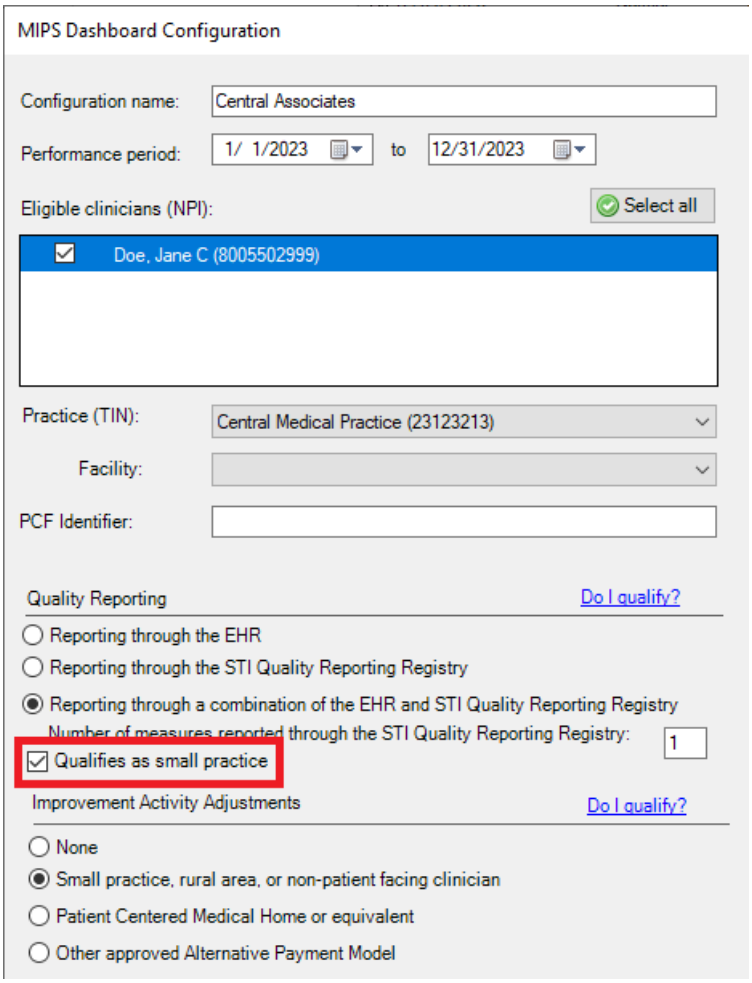


Figure 7 – MIPS Dashboard Configuration – Quality Reporting

Additionally, whenever the **Qualifies as small practice** option is modified, a new MIPS Configuration pop-up warning message will appear, alerting you that you will need to open the Quality card on the MIPS Dashboard, and then click OK, to allow the reconfiguration of the Category Score on the main MIPS Dashboard. See Figure 8.

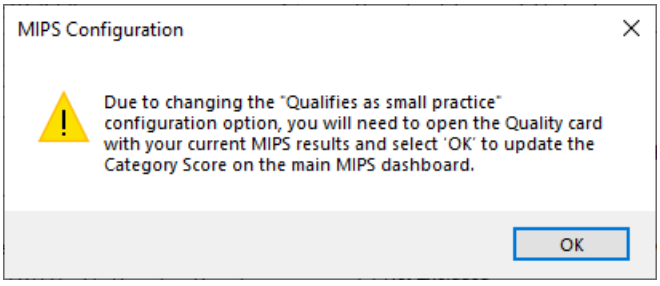


Figure 8 – MIPS Configuration Pop-Up Warning

Added Features (continued)

- **The Note Tab – Custom Forms –** The ChartMaker Medical Suite: Forms dialog has been updated with a new signature option that allows you to sign custom forms for a selected signature field using the Clinical signature widget instead of a Topaz signature device. The signing buttons have been updated to include a Topaz signing button that has been relabeled, a new signing button that uses the Clinical signature widget, and a clear selected signature button. See Figure 9. Each button has an applicable tooltip when hovering the mouse over the button.

  When the new signing button has been clicked, a Signature dialog will appear allowing the signee to electronically sign using the mouse, touchscreen, or stylus to provide a signature, depending upon the type of hardware used. Once an approved signature is provided and the **OK** button clicked, the signature will fill the selected signature field.

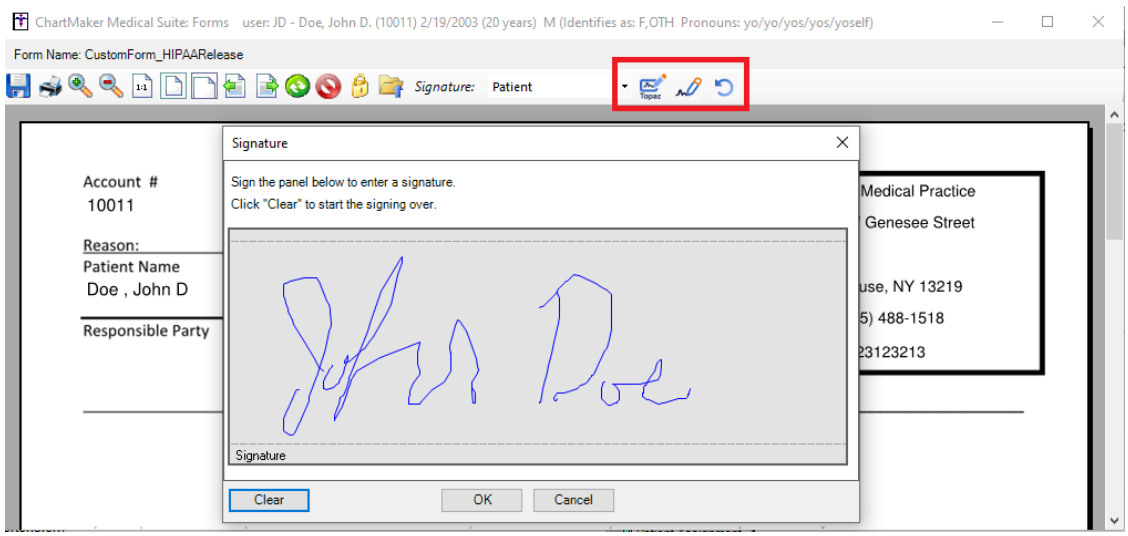


Figure 9 – ID Tab – Case

- **The Note Tab – Order Procedure – Immunizations –** The program has been updated to ensure that the latest CVX codes and CVX mappings, MVX codes and MVX mappings, Manufacturers, and NDC codes, per the latest CDC guidelines, are used for immunization procedures.

Added Features (continued)

- **Preferences — Orders/Order Sets –** The **Orders** section of the **Orders/Order Sets** tab, has been updated with a new **Include CPT modifiers on Orders** option, allowing you to have up to 4 modifiers print on the order when attached to the lab, image, or test order procedure. See Figure 10.

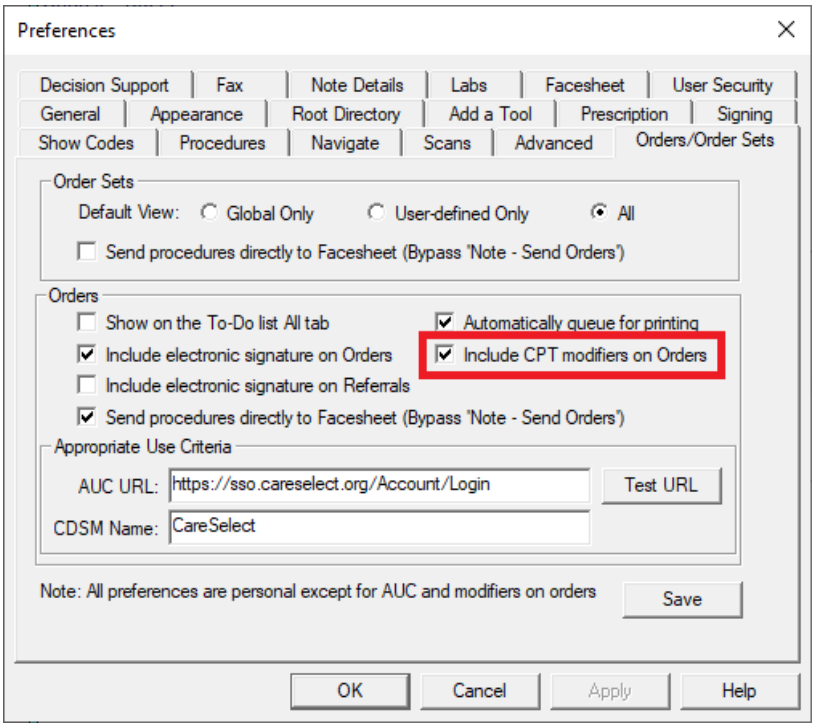


Figure 10 – Preferences – Fax

When the **Include CPT modifiers on Orders** option is selected, whenever a procedure order is printed or previewed, the modifiers attached to that procedure order (up to four modifiers), will print directly below the Comment line of the procedure order. See Figure 11.

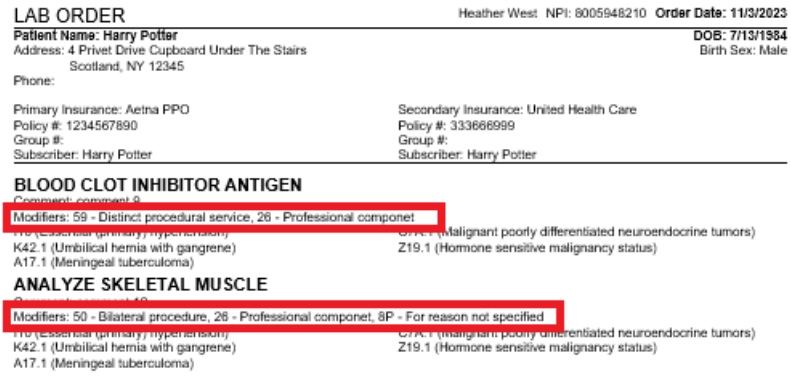


Figure 11 – Orders – Modifiers

Added Features (continued)

- **Scan Management –** The **Case** drop-down list, in the **Scan Management** screen, has been updated so that the cases listed, excluding the Normal case, will have the Open Date, if entered, appended to the case label to easily identify the applicable case the scan should be filed into. See Figure 12. Additionally, the checkbox options have updated so that they are only selectable when clicking the checkbox or the checkbox label. In previous versions, the checkbox options could become activated by clicking outside the checkbox or label.

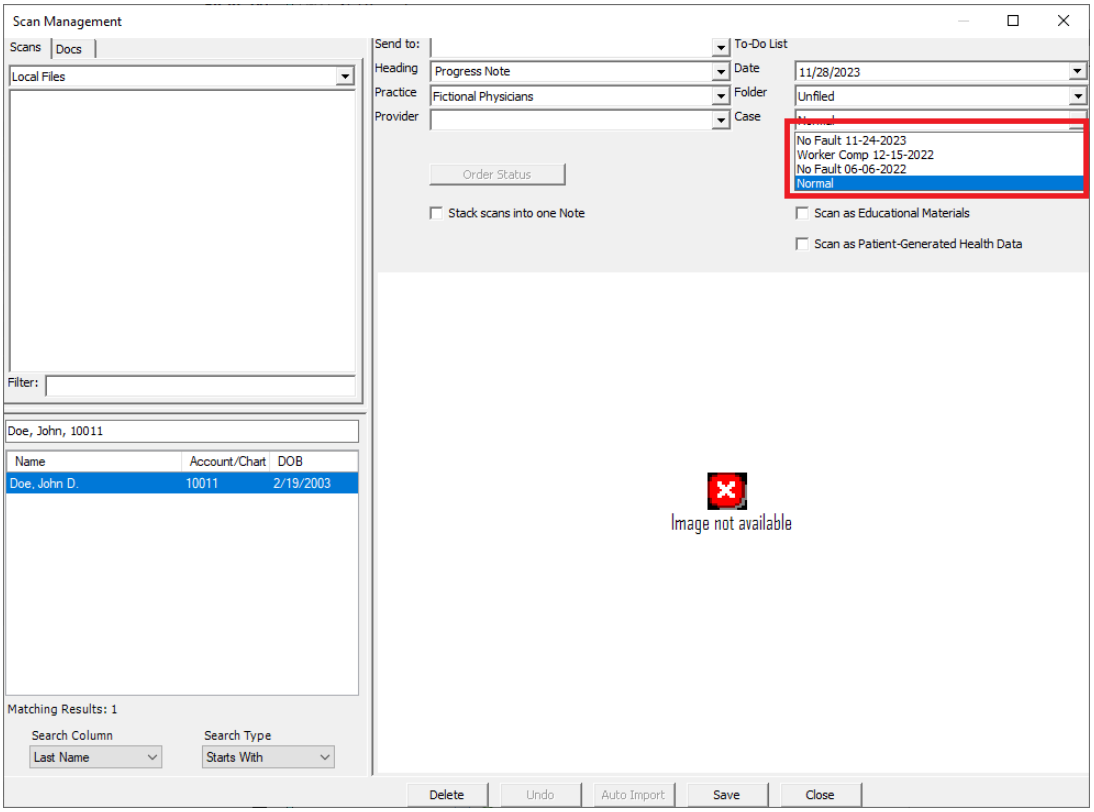


Figure 12 – Scan Management

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